SOPHTLOGIC

Query Manager

User Manual

For more information:
E: diane.mcgovern@sophtlogic.com
T: 01473 255552

Table of Contents

INTRODUCTION **4**

TYPES OF REPORT: **4**

Reporting Windows *4*

QueryBuster *4*

User Defined Reporting *4*

QUERY MANAGER **5**

SETTING UP THE LIBRARIES 5

Add a Library *6*

SET-UP A USERS WITHIN THE LIBRARIES 7

Linking the Department to the Query Library *7*

LIST PUBLISHER 11

Query Heading to Long *13*

Withdrawal Published Query form Library *13*

Inspect a Published Query *14*

QUERY BUSTERS **15**

RUNNING QUERIES 15

Query Window *16*

Verifying a Query is Correctly Formed *18*

Reasons That a Query May Not Run Correctly. *18*

DEFINE THE QUERY FURTHER… 20

And / OR *24*

SAVING AND OPENING A SAVED QUERY 26

Delete, Duplicate, Rename a Saved Query *27*

AUTOMATIC QUERIES **28**

Setting-Up Automatic Queries *28*

Retrieving Automatic Queries *31*

RETRIEVING RESULTS OF AUTOMATIC QUERIES **32**

Reference Date Functionality *33*

Introduction

The level of detail needed when entering data into pharOS means that the information available is very comprehensive. Reports can be as simple or complex as necessary. This manual gives the user the tools to interrogate the database and save commonly-used Queries.

Types of Report:

There are 3 levels of reporting within pharOS.

Reporting Windows

There are standard windows which provide reports to be run with little or no user intervention. At the most basic level a reporting window would load, for example, all personnel who are due for a medical.

Most windows however will allow for search criteria to be entered in order to restrict the results. These generally include a date range, and may include options to restrict location, rank, post type (ie Whole Time, Retained, APTC) or service number/person's name. This type of report is always specific to the individual modules and will be covered in detail in the corresponding manuals.

QueryBuster

This is the next level in complexity, which also means greater flexibility. Query Busters are standard reports that are published by SOPHTLOGIC. The fields and search criteria can be defined by the user.

User Defined Reporting

This offers the greatest flexibility, but requires a higher level of competency. Reports have to be generated by choosing the tables, fields and search criteria.

Query Manager

Setting up the Libraries

The Query Buster system allows an administrator to section the information held within the system into Electronic Libraries, access to which is completely user-definable. Access is granted to Administrative Units who are then deemed to own the data held within those Libraries.

Administrative Unit supervisors may then publish the data held within the libraries to other users of the system who require access to it.

Users with access to books within these Libraries may then construct and Save Queries and transport the data from those Queries into other applications (such as Microsoft Excel) where it may be formatted in any way that the host applications allow.

The Query Builder makes full use of graphical user interface facilities and data is made available using common English terms rather than cryptic computer terminology. There is no need for users of the system to learn query languages.

On the 'Global Navigator'

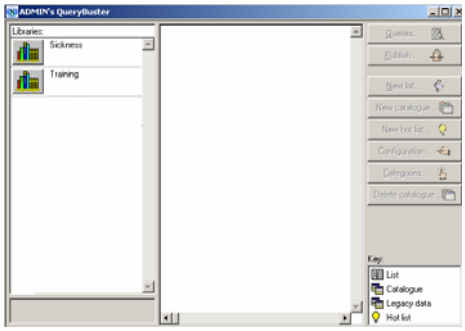
- Click onto the 'Query Manager' button

The 'Query Manager' button will appear in the toolbar

DIANE.MCGOVERN@Sophtlogic Demonstration system (Build 2059)
File Edit Navigation SOPHT.net Fire Safety Query Manager Window

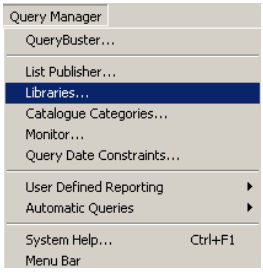
First of all let's look at 'Query Buster' to see what 'Libraries' (departments) you are able to see

- Click onto 'Query Manager'
- Click onto 'Query Buster'



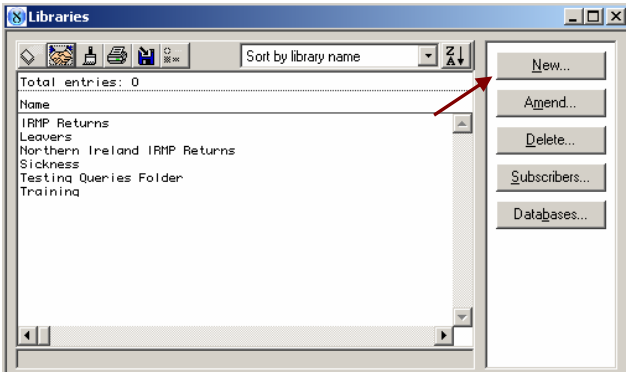
As you can see you can see 'Sickness' and 'Training' libraries

- Close the 'Query Buster' window



- Click onto 'Query Manager'
- Click onto 'Libraries'

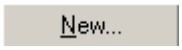
The ‘Libraries’ window will appear



As you can see there is already a list of ‘Libraries’

To add a library

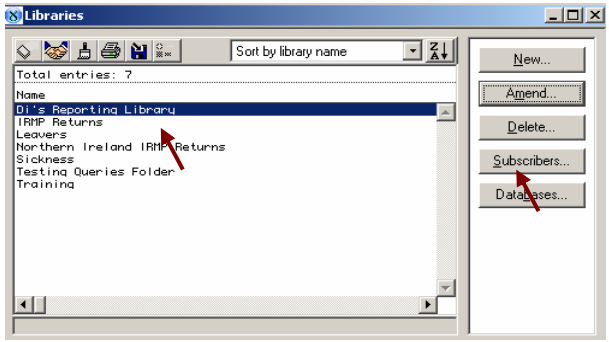
Add a Library

- Click onto the ‘NEW’ button 

The ‘Library Setup’ box will appear

- Enter the ‘Name’ of your library
- Click onto the ‘OK’ button

As you can see, ‘Di’s Reporting Library’ in now been inserted into the Libraries list.

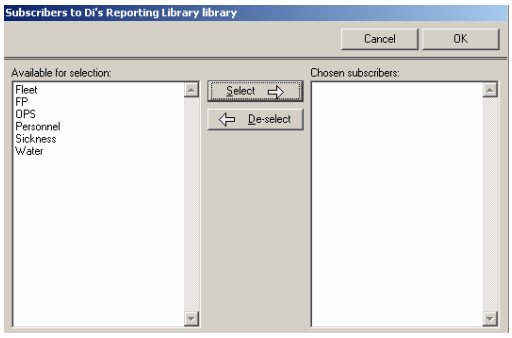


- Click onto the Subscribers button

Set-up a Users within the Libraries

Linking the Department to the Query Library

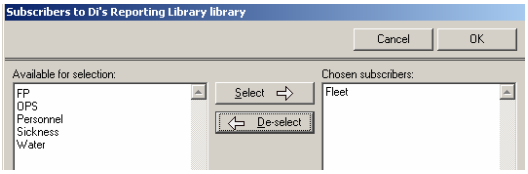
Based on what Queries the Brigade wants their staff to see

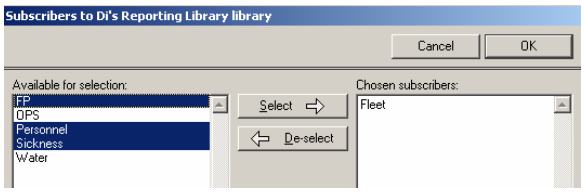


As you can see there are no Offices/Departments selected to view the Queries in this Library.

- Click onto one of the Offices/Departments
- Click onto the Select Button

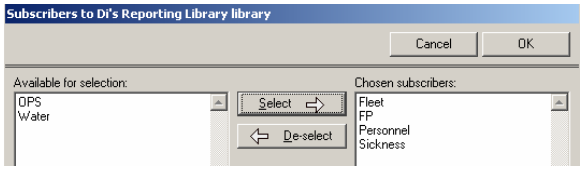
This will move the selected Libraries from the right window to the left window, giving the user within that library (department) access to the queries in your Library (department).





Or hold down the 'Ctrl' key and click onto the libraries you want to 'Select'

- Click onto the OK button



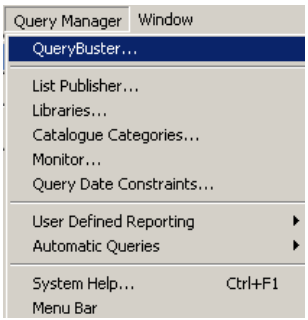
Remember: By 'Selecting' the libraries will able the users linked to that library (department) to see your queries in your library, but you will not be able to see their queries in their libraries (department) unless your library is selected to their library.

Check the Library has appeared in Query Buster

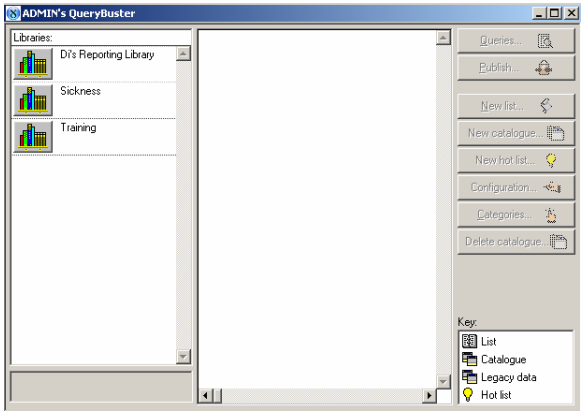
- Open Query Buster

From the Global Navigator load the Query Manager menu.

- Click onto Query Manager
- Click onto Query Buster



The Query Buster window will appear



As you can see the User/Post is authorised to use the 'Personnel and Di's Testing' Library

Let's authorise the user to access more 'Libraries'.

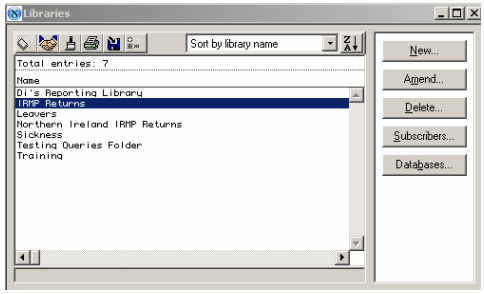
- Close this Query Buster window

In your tool bar:

DIANE.MCGOVERN@Sophtlogic Demonstration system (Build 2059)
File Edit Navigation SOPHT.net Fire Safety Query Manager Window

- Click onto Query Manager
- Click onto Libraries

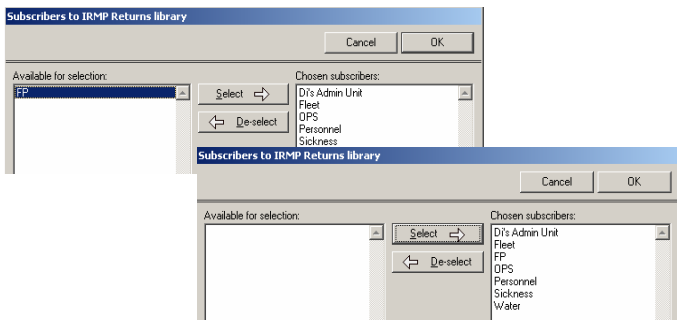
The Libraries window will open



- Click onto one of the Libraries
- Click onto Subscribers button

By clicking on any of the Libraries your will see the same options – Fleet, Personnel, Water, Sickness FP and OPS - The reason for this is in the 'User Administration' these are the Offices you allocated to the Username.

As you can see in this window there are six Administrative Units (departments) have been selected to the 'Chosen Subscriber' window.



- Click and Highlight FP
- Click onto the Select button

The 'FP' library (department) has moved over to the 'Chosen Subscribers' list'

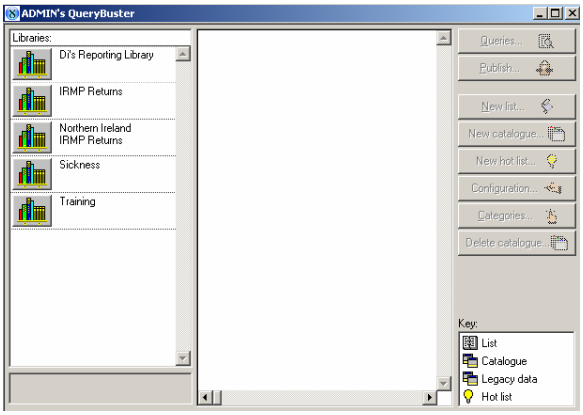
- Click OK

Continue instruction above to access other libraries you are authorised to see

Let's go back to 'Query Buster'

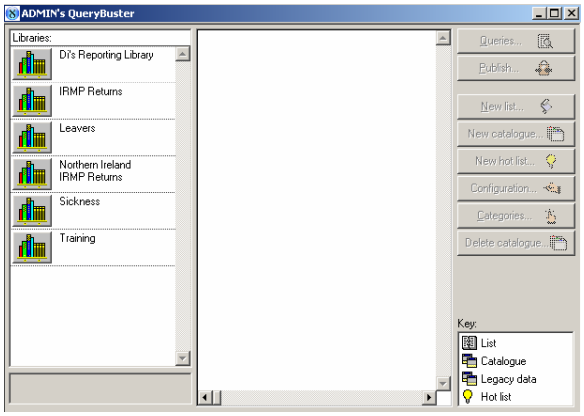
- Click onto Query Manager
- Click onto Query Buster

As you can see



The Libraries has been added to the Library list

If the Library does not appear in the libraries list, this could be because your Library has not been selected within the e.g. Leavers Library even though you have selected Leavers into your Library.

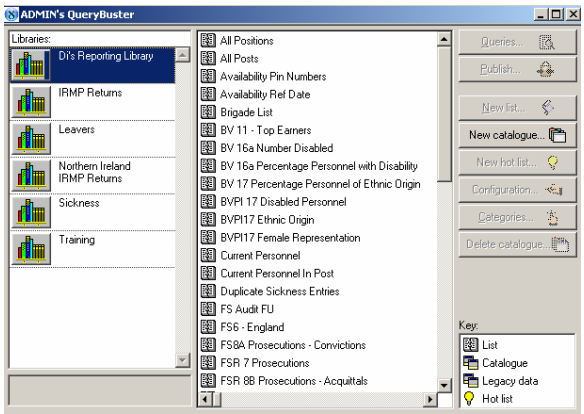


- Go back to Libraries
- Click onto the Leavers Library
- Click onto the Subscribe button
- Select an Option (Leavers)
- Click onto OK

- Click onto Query Manager
- Click and Refresh onto Query Buster

You have now given the User/Post access to see another Library (department).

By following the steps above you can add as many 'Libraries' (department queries) that you are authorised to use in your 'User/Post'.



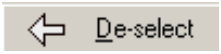
- Click onto one of the Department icon

Any Queries that have been set up will be saved in that Library

Five steps to check that the Query Library has worked

1. Have a look of what Administration Units the user has got – (Two Faces Icon)
2. Setup and/or assign the department to the User/Post – (Privilege Profile)
3. Subscribe the Query Buster Library to the Departments – (Library)
4. In Query Buster you should see the Libraries – (Query Buster)

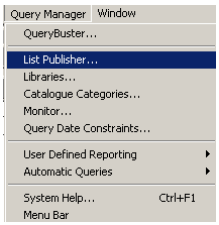
If you have selected too many Libraries follow the instructions above but this time:

- Click onto the De-Select button 

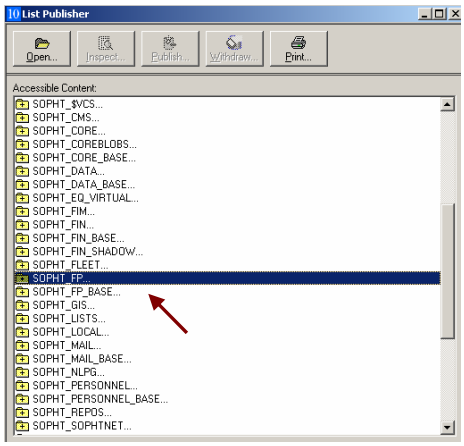
List Publisher

List Publisher allows you to publish lists, select required columns and put them in certain Libraries

- Click onto Query Manager
- Click onto List Publisher



The List Publisher window will open



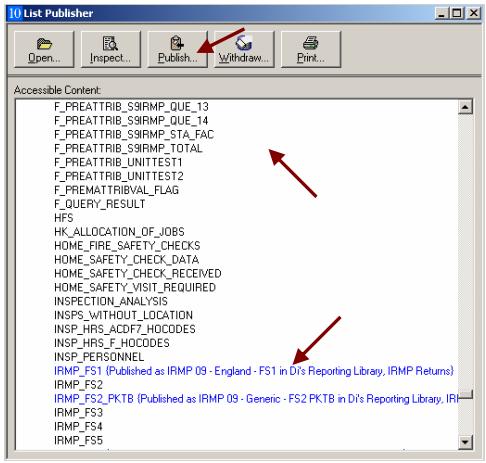
The List Publisher window you will see a list of folders.

These folders relate to accounts e.g. 'Fire Safety', 'Personnel' related views would be held in the SOPHT_FP, or SOPHT_PERSONNEL' folder.

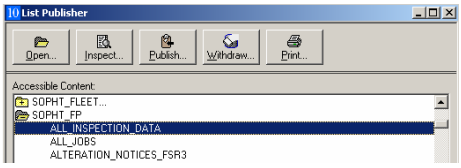
Please note 'Account Name' in the 'Accessible Content' list will be preceded by the 'FRS' abbreviated name e.g. 'BEDS_', 'MSB_' etc...

- Click onto one of the Folders
- Click onto the Open icon

A list of published (in blue) and un-published (in black) - pre setup queries will appear

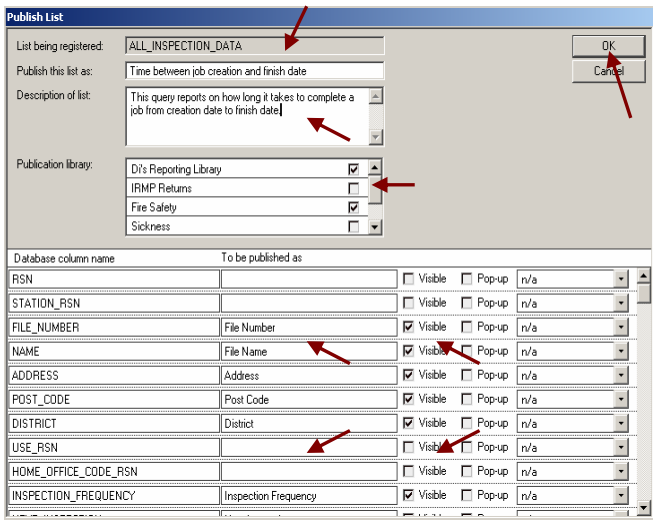


- Click onto a 'Query'



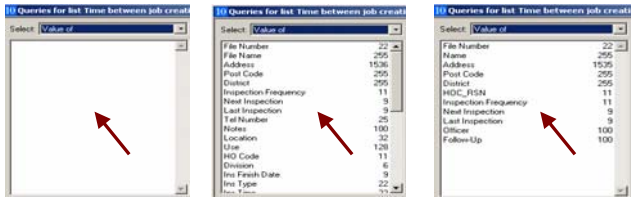
- Click onto the 'Publish' icon

The ‘Publish List’ window will appear



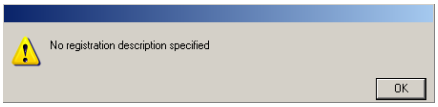
- In ‘Publish this list as’ box enter a ‘Name’ of the query
- In ‘Description of list’ box enter a brief ‘Description’ of the query
- In the ‘Publication library’ box tick into the checkbox of the ‘Libraries’ you want this query to appear
- In the ‘To be Published As’ column - Enter the Field Name (brief translation of the column name)
- Tick into the Visible box of the fields you want to be in the Query

If you do not tick the ‘Visible’ check box the fields will not appear in the Query – as shown -

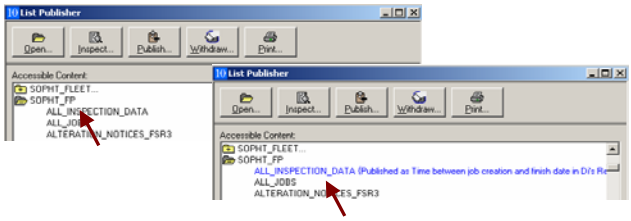


A ‘Processing’ dialog box will appear counting the fields selected then it will disappear

If no text is entered into the description box you may get a dialog box appear saying there is no description specified

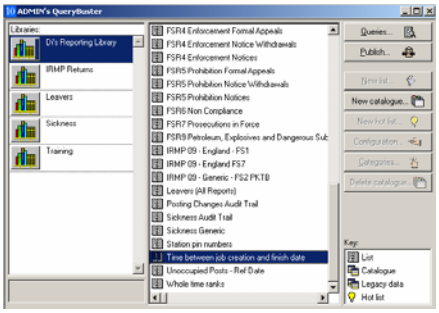


- Click onto the OK button



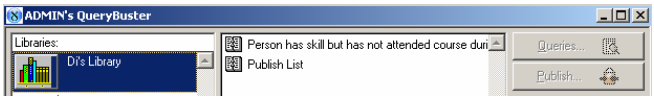
As you can see the query selected has changed from black text to blue with the path name where the query has been published.

As you can see the ‘Query’ has been ‘Published’ into your ‘Library’



Query Heading to Long

If the heading; like in this case is to long

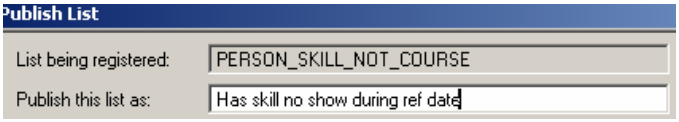


- Go to 'List Publisher'
- Click onto the folder the query is in

PERSON_NU_BA_TRAINING
PERSON_SKILL (Published as PERSON_SKILL in Personnel)
PERSON_SKILL_NOT_COURSE (Published as Person has skill but has not attended cours
PERSON_SUBROLES

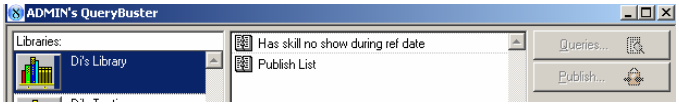
- Click onto the 'Query'
- Click onto the 'Publish' icon

In 'Publish this list as' box



- Enter a shorter name
- Click onto the 'OK' button

As you can see the name of the query is now shorter

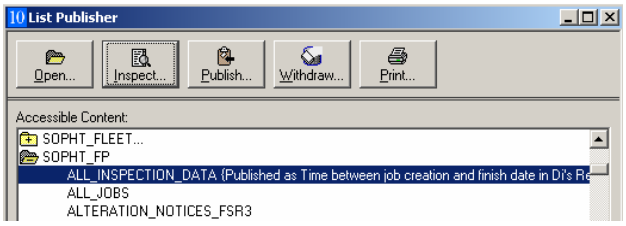


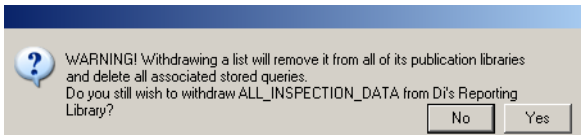
By repeating the above, you can insert as many queries; that are relevant to the Library, as you like.

Withdrawal Published Query form Library

To remove the query from your library

- Click onto the query
- Click onto the 'Withdrawal' icon

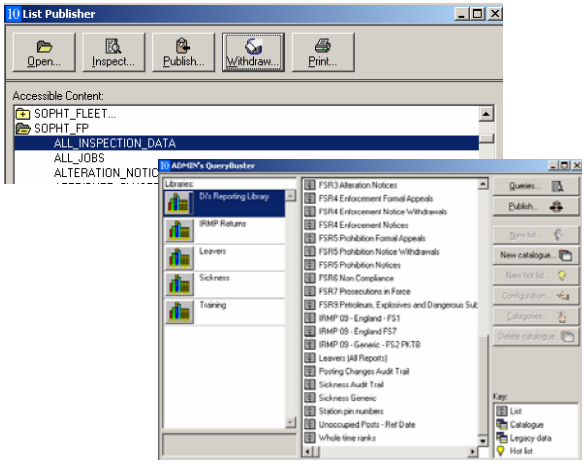



WARNING! Withdrawing a list will remove it from all of its publication libraries and delete all associated stored queries.
Do you still wish to withdraw ALL_INSPECTION_DATA from Di's Reporting Library?
No
Yes

A dialog box will appear asking you if you want to remove the query from your library

Please note if any 'Saved Queries' have been associated to the list being 'Withdrawn' they will be deleted.

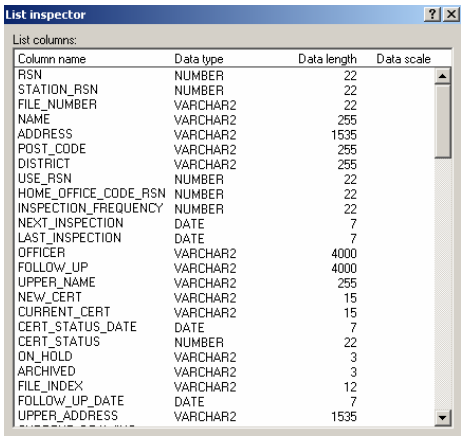
- Click onto the 'Yes' button



As you can see the 'Libraries' that the query was posted to has been removed form the 'List Publisher' and from the 'Query Buster Library'.

Inspect a Published Query

The List Inspector window displays all columns in the list selected, there associated data type and data length.

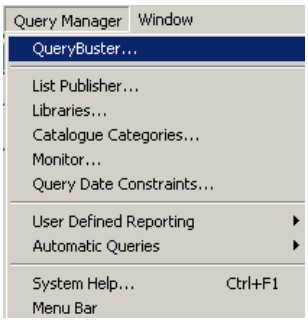


Column name	Data type	Data length	Data scale
RSN	NUMBER	22	
STATION_RSN	NUMBER	22	
FILE_NUMBER	VARCHAR2	22	
NAME	VARCHAR2	255	
ADDRESS	VARCHAR2	1535	
POST_CODE	VARCHAR2	255	
DISTRICT	VARCHAR2	255	
USE_RSN	NUMBER	22	
HOME_OFFICE_CODE_RSN	NUMBER	22	
INSPECTION_FREQUENCY	NUMBER	22	
NEXT_INSPECTION	DATE	7	
LAST_INSPECTION	DATE	7	
OFFICER	VARCHAR2	4000	
FOLLOW_UP	VARCHAR2	4000	
UPPER_NAME	VARCHAR2	255	
NEW_CERT	VARCHAR2	15	
CURRENT_CERT	VARCHAR2	15	
CERT_STATUS_DATE	DATE	7	
CERT_STATUS	NUMBER	22	
ON_HOLD	VARCHAR2	3	
ARCHIVED	VARCHAR2	3	
FILE_INDEX	VARCHAR2	12	
FOLLOW_UP_DATE	DATE	7	
UPPER_ADDRESS	VARCHAR2	1535	

- Click onto the Inspect icon

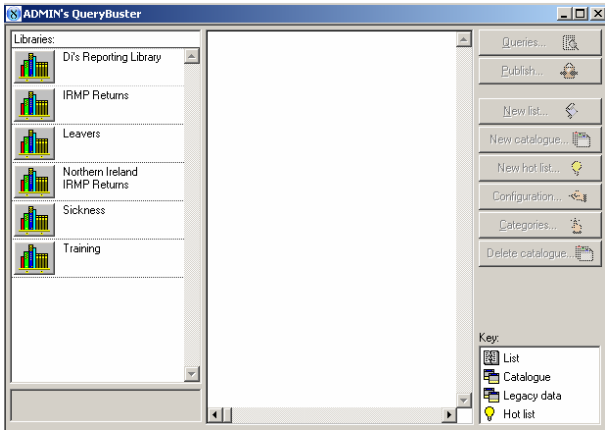
Query Busters

Running Queries



From the Global Navigator load the Query Manager menu.

- Query Manager
- Query Buster

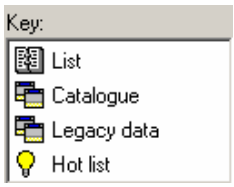


All of the Libraries that the current User/Post is authorised to view will appear in the left window.

Before we continue lets take a look at what all these icons on the right of the window do

Some of the icons that are greyed out, the reason for this is…..the functionality is no longer appropriate

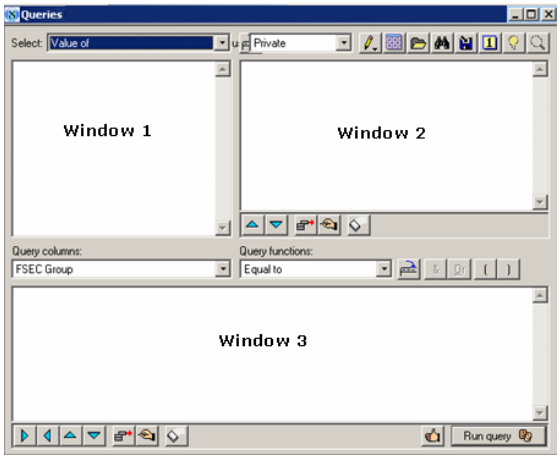
There is a 'Key' box in the bottom right hand corner to let you know what the pictures next to the Queries mean.



Query Window

- Select a 'Query' from the list
- Click on 'Queries' button.

The query for list Leaver will appear – as shown



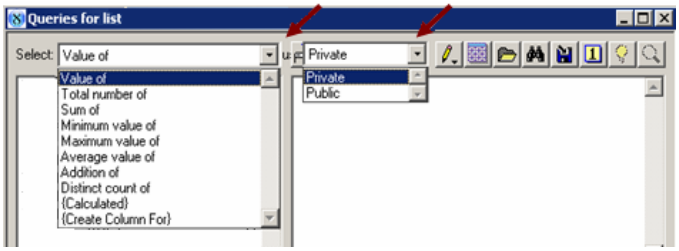
The 'Query for list' contains 3 windows

Window 1 – List of the available fields within the query. Multiple values can be selected from this list.

Window 2 – Where the selected fields will be displayed

Window 3 - Is where you can define the search

By changing this dropdown, the status of the saved query will not automatically be saved.



By default this will select the 'Value Of the Fields', but there are other options: some examples to follow

Value Of	Displays all details – most commonly used
Total Number Of	Gives a count of the number of records
Sum Of	Must be used against a number field – i.e. Sum of Total Hours
Minimum Value Of	Maximum total
Maximum Value Of	Minimum total
Average Value Of	Must be used against a number field – i.e. gives you an average of hours worked
Addition Of	Must be used against a number field
Distinct Count Of	Count of the number of different values in selected field

When one of these functions is used, other than 'Value Of', the rest of the 'Value Of fields' will be grouped together > each combination of values will only appear once.

The ‘Public’ and ‘Private’ dropdown shows the current status of the open query.

Private = only the user who created the query will be able to see the query

Public = anyone can access the query

The buttons at the top of this window have the following functions:

Clears the existing Query and Report Criteria

Set up Saved Query as an Automatic Query

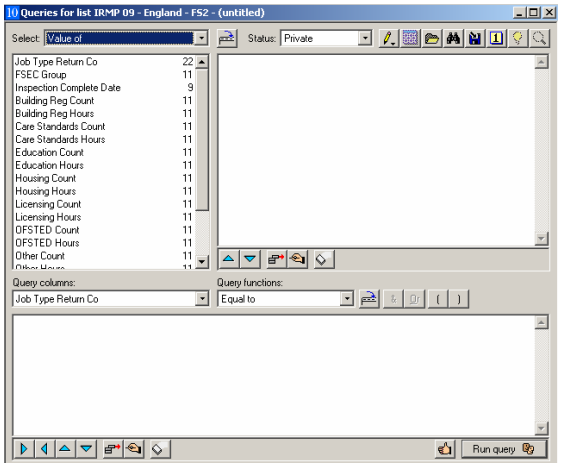
Opens a Saved Query

Prompts for revision on an existing set of Data

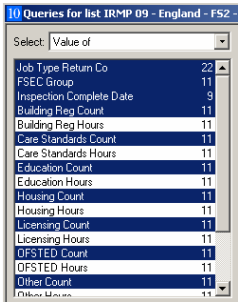
Saves the current Query **(Shift + Click can be used to Save As – so as not to overwrite an open saved Query)**

Enter a Reference Date Range

Multiple values can be selected from this list by dragging the mouse across the fields or use the Ctrl key and click onto the selected fields.



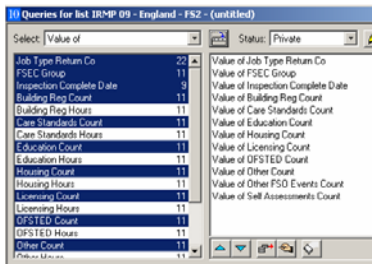
- Click to highlight multiple lines.



Once, at least one line has been selected from the above list.

- Click onto the blue arrow button

As you can see the two fields I have highlighted have moved to the right and will be returned in the column table. As shown (window two)


10 Queries for list IRMP 09 - England - FS2 - (untitled)
Select: Value of
Status: Private
Job Type Return Co 22
FSEC Group 11
Inspection Complete Date 9
Building Reg Count 11
Building Reg Hours 11
Care Standards Count 11
Care Standards Hours 11
Education Count 11
Education Hours 11
Housing Count 11
Housing Hours 11
Licensing Count 11
Licensing Hours 11
OFSTED Count 11
OFSTED Hours 11
Other Count 11
Value of Job Type Return Co
Value of FSEC Group
Value of Inspection Complete Date
Value of Building Reg Count
Value of Care Standards Count
Value of Education Count
Value of Housing Count
Value of Licensing Count
Value of OFSTED Count
Value of Other Count
Value of Other FSO Events Count
Value of Self Assessments Count

The buttons in this section do the following:

	Move Up and Move Down – select a line from the included fields then use these buttons to change the field order.
	Remove Line
	Amend Line
	Clear List

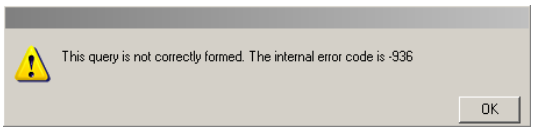
Verifying a Query is Correctly Formed

First before you '**Run the Query'** you can check to see if the Query is correctly formed

- Click onto the 'Thumbs Up' button.

If the query is correctly formed the following message will appear:

If the query has errors an error message will appear.



Reasons That a Query May Not Run Correctly.

1. Normally errors are caused when the where clause is not correctly formed – i.e. there are open brackets without close brackets. Check that the where clause always reads:

   expression
   and/or
   expression
   and/or
   expression

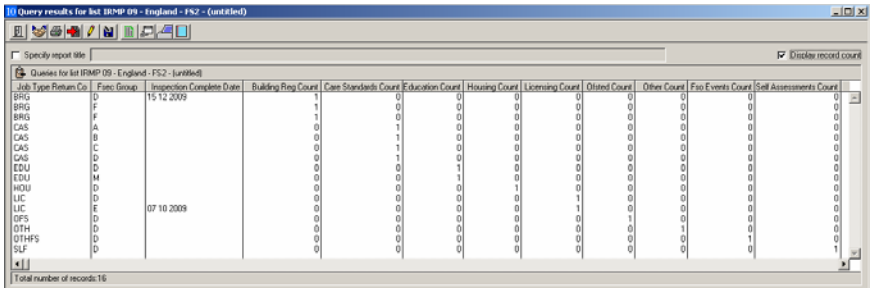
2. Functions may have been set incorrectly. For example a sum can only be performed on a number field. If a user tries to sum any field other than a number then it will cause an error.

3. There are errors in the underlying query. [Save first if required] To test this, take out any fields that have been selected and remove the where criteria. Then press the Thumbs Up button. If there is still an error then this should be reported to SOPHTLOGIC.

If the query is correctly formed then press the 'Run Query' button to execute the query.

- Click onto the Run Query button

The outcome of the Query will appear – as shown



Let's take a look at the toolbar at the top of this window and what the buttons etc do…

The buttons on this window do the following:

	Close results window
	Export to Excel. It is much better to use the export option from he brown clipboard to do this
	Prints the results
	Print labels from the results in the list
	Can be used to specify a title for the report
	Save results to database
	Create html document (must save query first)
	Open as html document (must save query first)
	Print as html document (must save query first)
	Export to .csv (comma separated values) text file

- Select 'Display Record Count' to view the number of records returned.

This will show at the bottom of the window

Select the 'Specify Report Title' check box to be able to enter a name for the report.

This will be used when printing the report.

- Click onto the 'Print' icon

As you can see the where the 'Heading' would go in the report

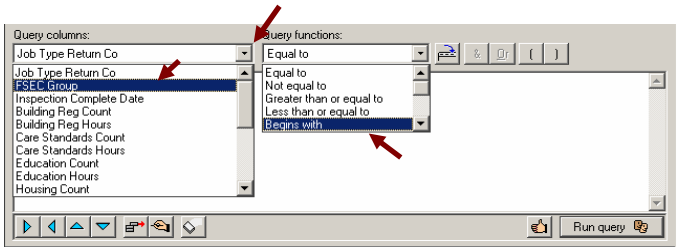
Define the Query Further…

The bottom half of this window allows for the results to be restricted.

The buttons in this section do the following:

	Adds an 'And' clause into the search criteria
	Adds an 'Or' clause into the search criteria
	Adds brackets to the search criteria
	Move Up and Move Down – select a line from the included fields then use these buttons to change the field order
	Increase and Decrease Indent
	Remove Line
	Amend Line
	Clear List

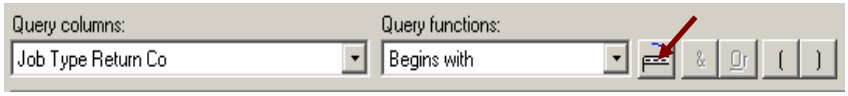
The ‘Query Columns’ drop down list will show all of the available fields.



The ‘Query Functions’ dropdown gives the following options to restrict data.

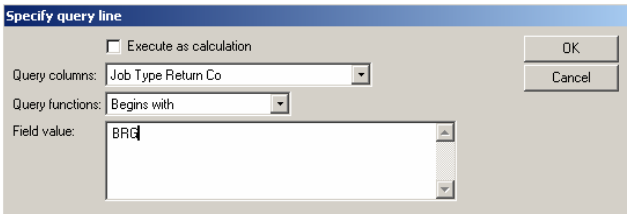
- Choose a field to restrict the data by.

As you can see I have chosen ‘Job Type Return Co’ and ‘Begins With’



- Click onto the blue arrow button

The ‘Specify Query Line’ window will appear:



The ‘Query Column’ > ‘Job Type Return Co’ and ‘Query Function- > ‘Begins With’ have already been entered.

To change either of these boxes

- Click onto the arrow and choose from the dropdown list

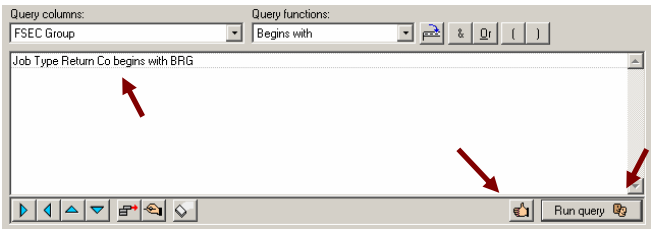
In the ‘Field Value’ box

- Enter your ‘Field Value’

The ‘Field Value’ is basically were you asking the system a question – I want to know all ‘Job Type Return Co’ ‘Begins With’ ‘BRG’

- Click onto the ‘OK’ button.

As you can see the ‘Job Type Return Co’ ‘Begins With’ ‘BRG’ has appeared in the query window

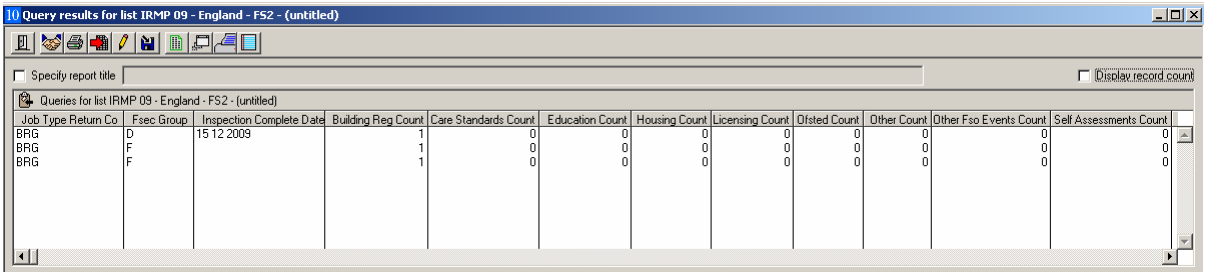


First before you ‘**Run the Query’** you can check to see if the query is correctly formed

- Click onto the ‘Thumbs Up’ button.

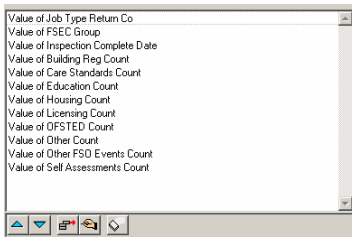
If the query is correctly formed the following message will appear:

- Click onto the ‘Run Query’ button


Query results for list IRMP 09 - England - FS2 - (untitled)
Specify report title
Display record count
Queries for list IRMP 09 - England - FS2 - (untitled)
Job Type Return Co | Fsec Group | Inspection Complete Date | Building Reg Count | Care Standards Count | Education Count | Housing Count | Licensing Count | Ofsted Count | Other Count | Other Fso Events Count | Self Assessments Count
BRG | D | 15 12 2009 | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0
BRG | F | | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0
BRG | F | | 1 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0

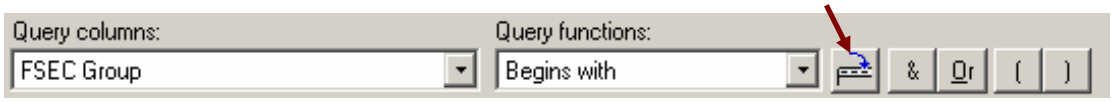
The ‘Results’ for the ‘Query’ will appear – as shown

Notice that the headings are the same to the last query we did. The reason for this is the query is still using the criteria that we selected from the fields and moved them over to the results table.


Value of Job Type Return Co
Value of FSEC Group
Value of Inspection Complete Date
Value of Building Reg Count
Value of Care Standards Count
Value of Education Count
Value of Housing Count
Value of Licensing Count
Value of OFSTED Count
Value of Other Count
Value of Other FSO Events Count
Value of Self Assessments Count

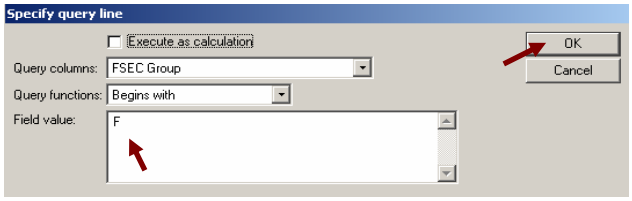
Now let's breakdown the query further

As you can see I have chosen 'FSEC Group' and 'Begins with'



- Click onto the blue arrow button

The Specify Query Line window will appear:



The 'Query Column' > 'FSEC Group' and 'Query Function' > 'Contains' have already been entered.

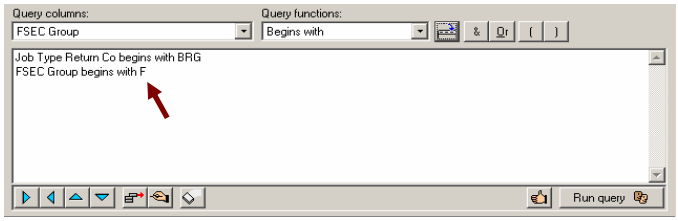
To change either of these boxes

- Click onto the arrow and choose from the dropdown list

In the 'Field Value' box

- Enter your 'Field Value'

The 'Field Value' is basically were you asking the system a question – I want to know all 'FSEC Group' 'Begins with' the letter 'F'



And / OR

Use the And / Or buttons to breakdown your Query

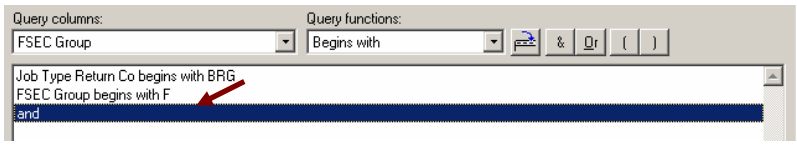
AND = Surnames beginning with the letter 'S' AND 'Location' containing the letter 'N'
OR = Surnames beginning with the letter 'S' 'OR' 'Location' containing the letter 'N'
( ) = You would use the brackets if you are giving more than one option – For example

Year = 2007
OR
(Type = A **AND** Location = B)

(Year = 2007 **AND** Location = A)
OR
(X = Y **AND** A = B)

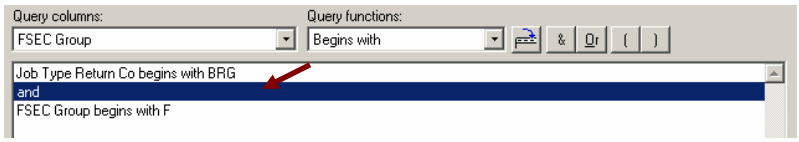
- Click onto the 'AND' (&) icon

This has now been entered into the query



As you can see the 'AND' has appeared at the bottom of the list, you need it to be in between the two expressions. To do this

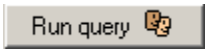
- Click onto the 'Arrow' icon

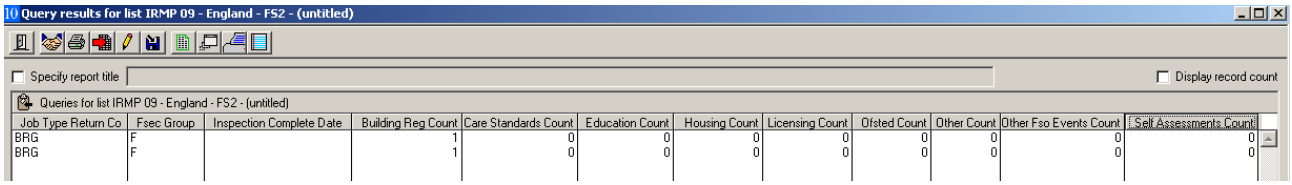


As you can see the 'AND' has moved up between the expressions.

To make sure the query is set up correctly

- Click onto the 'Thumbs Up' icon

- Click onto the 'Run Query' icon 

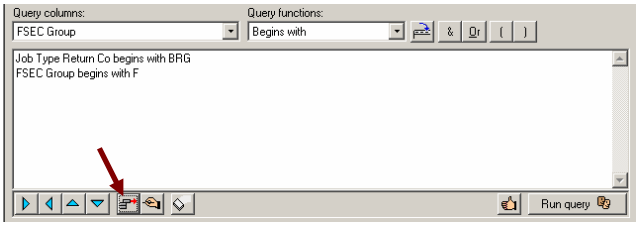

Query results for list IRMP 09 - England - FS2 - (untitled)
Specify report title
Display record count
Queries for list IRMP 09 - England - FS2 - (untitled)
Job Type Return Co
Fsec Group
Inspection Complete Date
Building Reg Count
Care Standards Count
Education Count
Housing Count
Licensing Count
Ofsted Count
Other Count
Other Fso Events Count
Self Assessments Count
BRG F 1 0 0 0 0 0 0 0 0
BRG F 1 0 0 0 0 0 0 0 0

As you can see the query has been broken down and two results have returned– for all 'Job Type Return Code' beginning with 'BRG' **AND** only for 'FSEC Group' beginning with 'F'

Let's take out the 'AND' and replace it with 'OR'

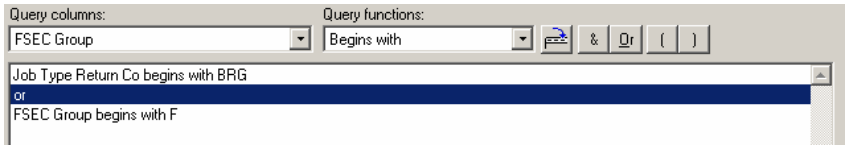
To remove the ‘AND’

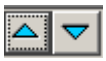
- Click onto the ‘AND’ (highlighted)
- Click onto the ‘Remove Line’ icon



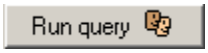
The ‘AND’ should now be removed

- Now click onto the ‘OR’ icon

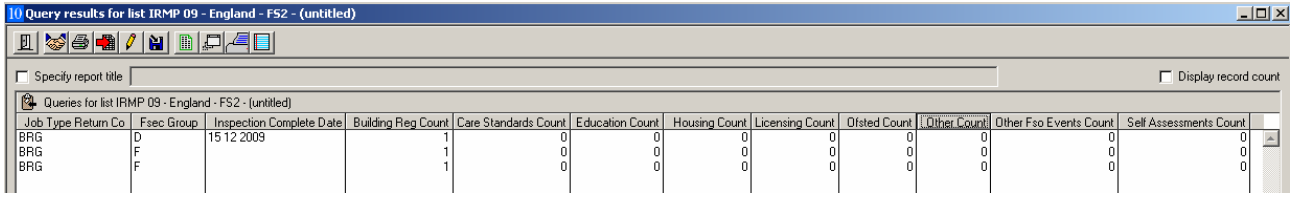


Use the arrows to put the ‘OR’ in between the expressions – as shown 

To make sure the Query is set up correctly

- Click onto the ‘Thumbs Up’ icon
- Click onto the ‘Run Query’ icon 

As you can see there are a lot more records within this query


Query results for list IRMP 09 - England - FS2 - (untitled)
Specify report title
Display record count
Queries for list IRMP 09 - England - FS2 - (untitled)

Job Type Return Co	Fsec Group	Inspection Complete Date	Building Reg Count	Care Standards Count	Education Count	Housing Count	Licensing Count	Ofsted Count	Other Count	Other Fso Events Count	Self Assessments Count
BRG	D	15 12 2009	1	0	0	0	0	0	0	0	0
BRG	F		1	0	0	0	0	0	0	0	0
BRG	F		1	0	0	0	0	0	0	0	0

As you can see the query has been broken down and 3 results have returned

Once you have created your query and you want to ‘Save’ it…

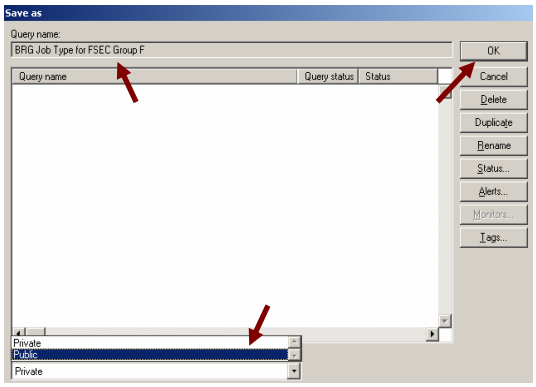
Saving and Opening a Saved Query

By 'Saving a Query', the field information and search criteria will be saved, and can then be restored using 'Open'.

Within the queries window

- Click onto the 'Save As' icon

The 'Open' and 'Save' window are basically the same:



When saving…

- Enter a meaningful 'Description' for the query.

The open dialog box will not allow the user to type in this field.

All existing queries would be shown in the list, and by selecting one, the 'Description' would be populated with the name of the selected 'Saved Query'.

Queries can be saved as 'Public' or 'Private'.

- Everybody with access to the current 'Library' will have access to 'Public Queries'.
- If a query is saved as 'Private', then only the current user can see this.

- Click onto the arrow

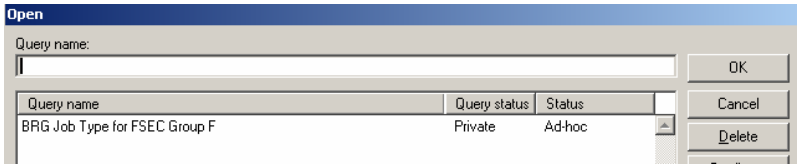
Specify the status before saving the query.

The query will be saved within this window

To view this query

- Click onto the 'Library'
- Open the 'Query' you had open earlier
- Click onto the 'Queries' icon
- Click onto the 'Open' icon

As you can see your ‘Saved Query’ is within this window



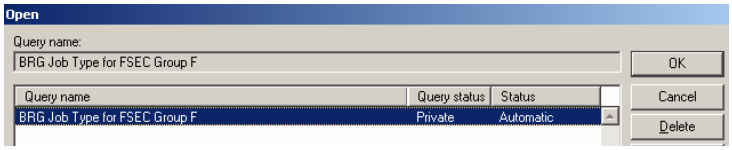
To change the status of a query at a later date,

- Bring up the ‘Open’ dialog,

Delete, Duplicate, Rename a Saved Query

To ‘Delete a Saved Query’

- Go to the ‘Open’ or ‘Save’ dialog
- Highlight the ‘Saved Query’

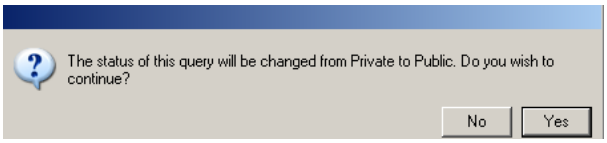


- Click onto the ‘Delete’ button

- Duplicate will prompt for a name for the new ‘Saved Query’

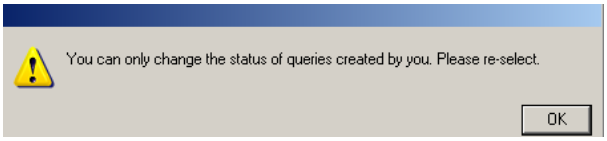
- Rename allows a ‘Saved Query’ to be renamed without the need to ‘Open’ and ‘Save As’.

The ‘Status’ button allows you to change the query from ‘Private’ to ‘Public’.



- Click onto the ‘Yes’ button

You may get a dialog box up saying that you did not create the Query so you can not change its Status



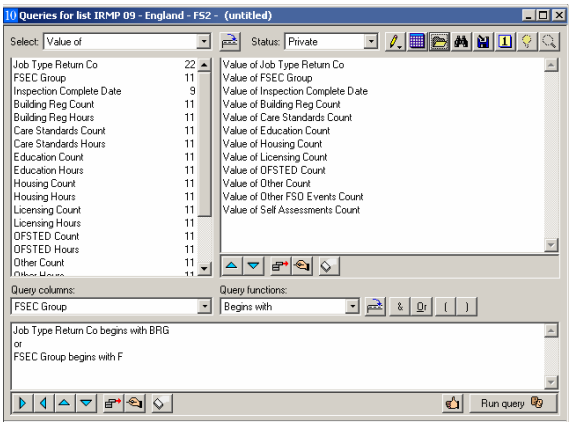
- Click on to the OK button

Automatic Queries

Setting-Up Automatic Queries

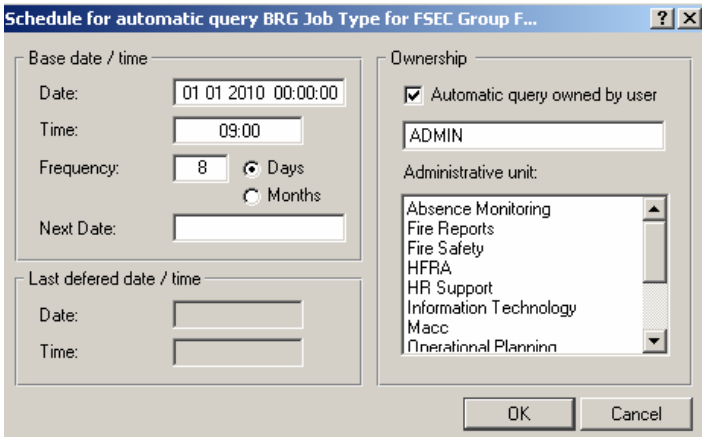
Scheduling queries allows a user to set up queries to be run at regular intervals. When a person logs in to pharOS they will be prompted with any outstanding 'Automatic Queries'. Once an 'Automatic Query' has been run the results are then stored in the database and can be compared to other results of the same query run previously.

In order to do this there must be a 'Saved Query'.



- Open the saved query to be added to the 'Automatic Queries'.
- Click on the 'Grid' button

This will open the 'Schedule for Automatic Query Applications' window



- Enter in a 'Base Date' i.e. date from which query is to start from
- Enter in desired 'Time' for the query to be run e.g. 09:00
- Enter in 'Frequency' of query whether it is in days or months
- Click 'OK' to 'Save Automatic Scheduling of Query'

For example: If you wish the query to run starting from the beginning of the year, with a frequency of every 8 days at 09.00, the 'Base Date' would be set at 08 12 2009, the frequency 8 with corresponding 'Days' radio button selected to 'Days' and time specified as 09.00

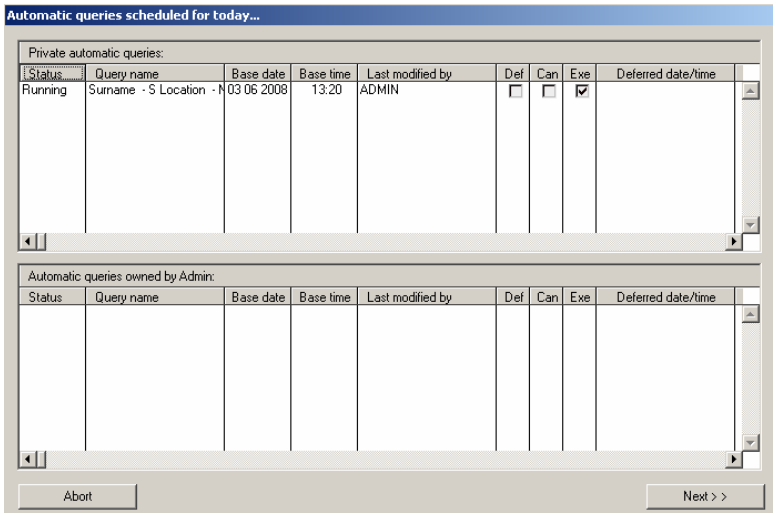
For the query to take affect

Log out

Login

- Choose the ‘Office/Department’ the Query was saved under

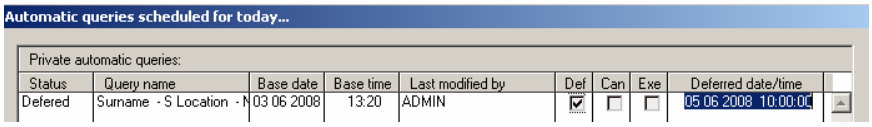
The ‘Automatic Queries Scheduled for Today’ window will appear



As you can see the ‘Scheduled Query’ is in the reminder window

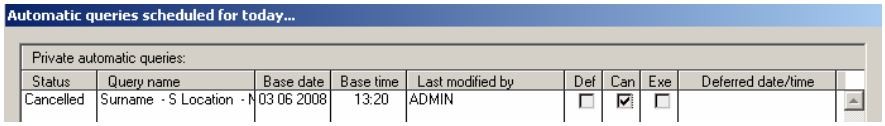
Deferred

This option will Defer the Query to a different date



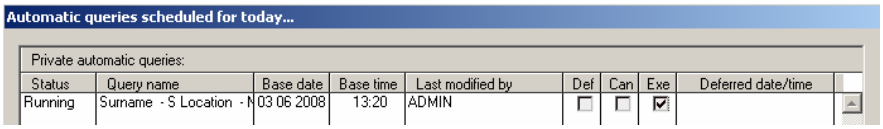
Cancelled

This option will Cancel the Query



Running

This option will Run the Query

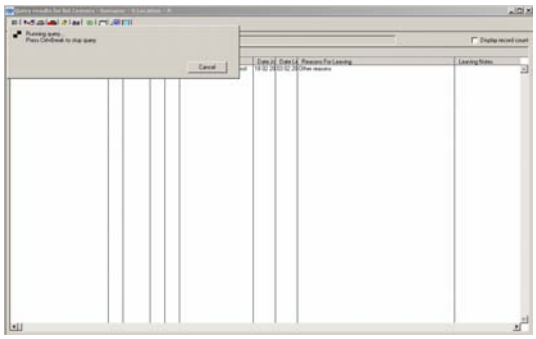


To run the Query

- Click onto the Next button

A dialog box will appear saying Executing Query

Very quickly the Query will flash onto the screen then disappear

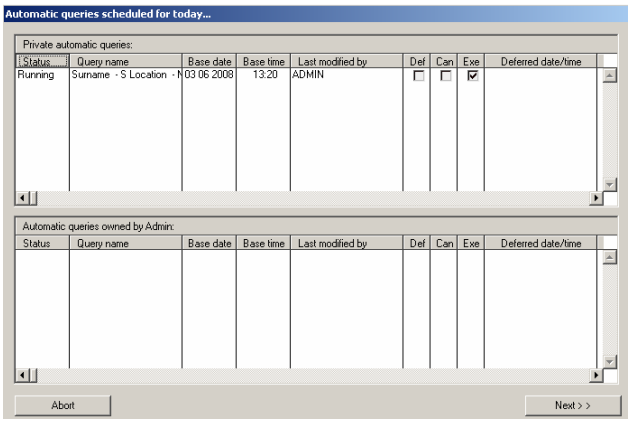


To Retrieving Results of Automatic Queries go to page

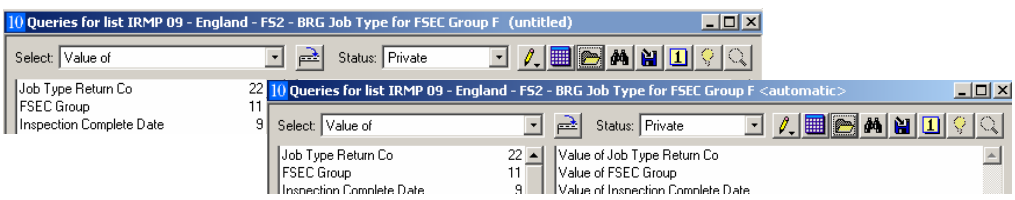
If you don't want the Query to Run

- Click onto the 'Abort' button

The 'Automatic Queries Scheduled for Today' window will close



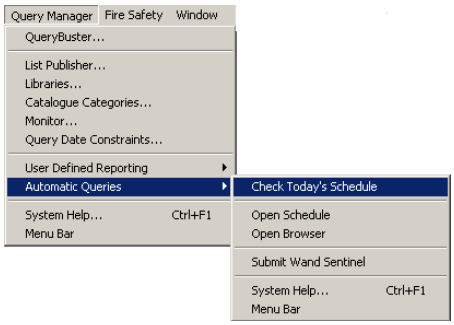
Notice the heading has changed on your saved (automatic) query from <untitled> to <automatic> This allows the user to know if the query has been setup as a to be automatically run


Queries for list IRMP 09 - England - FS2 - BRG Job Type for FSEC Group F (untitled)
Select: Value of
Status: Private
Job Type Return Co 22
FSEC Group 11
Inspection Complete Date 9
Queries for list IRMP 09 - England - FS2 - BRG Job Type for FSEC Group F <automatic>
Select: Value of
Status: Private
Job Type Return Co 22
FSEC Group 11
Value of Job Type Return Co
Value of FSEC Group

Retrieving Automatic Queries

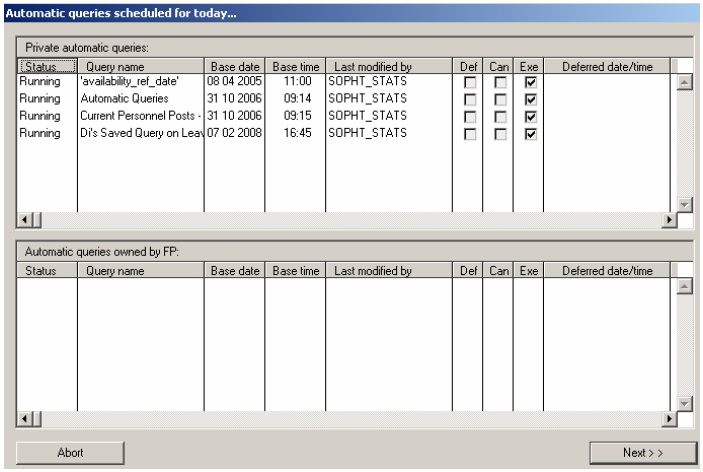
To check the Queries that was Automatically Scheduled for Today

- Click onto ‘Query Manager’
- Scroll down to ‘Automatic Queries’
- Check ‘Today’s Schedule’



If no queries are due to be run for that day, no window will display.

If queries do exist:



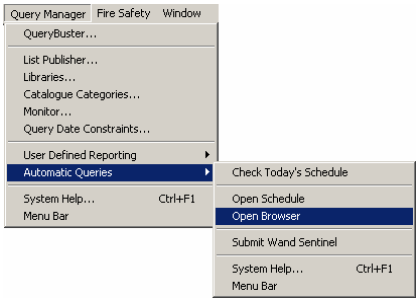
As you can see the query we have just created is now in the ‘Scheduled for Today’ list

- Click ‘Next’ to run any query listed

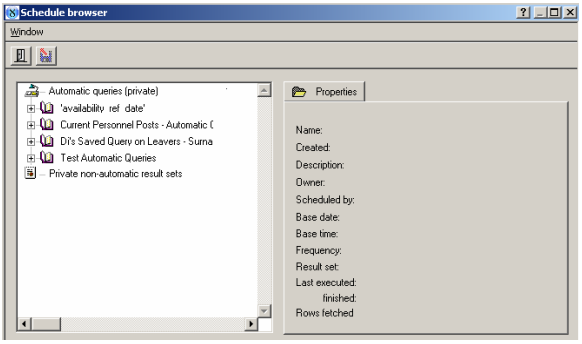
Other wise close this window and go to ‘Retrieving Results of Automatic Queries’

Retrieving Results of Automatic Queries

To see the results of the query that has just Ran



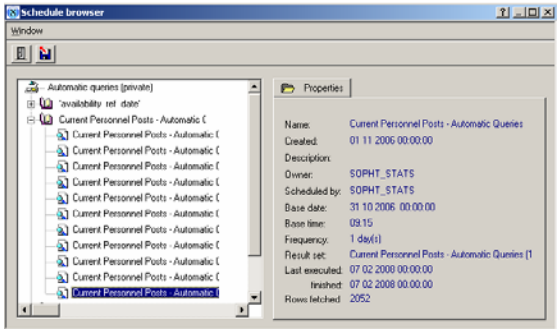
- Click onto 'Query Manager'
- Scroll down to 'Automatic Queries'
- Click onto 'Open Browser'

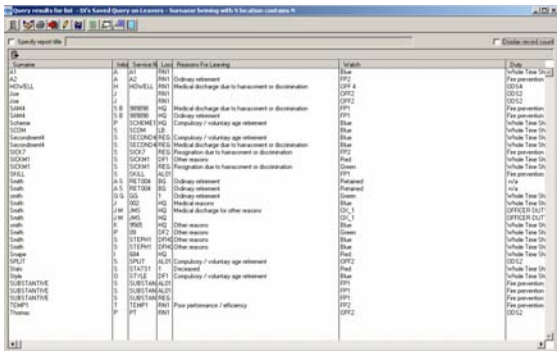


This window can also be accessed from within the published query view by clicking on the Binoculars icon.

- Select query by clicking on the '+' and any results of query run will be listed.

- Select results to be printed to screen and click on the floppy disk icon with a red arrow.



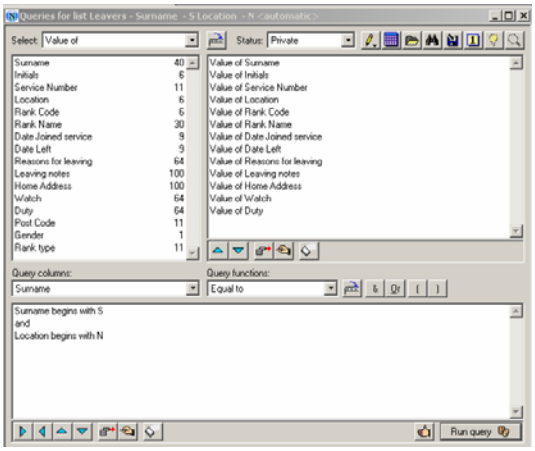


Results will now print to screen and can be printed to printer, saved or exported to excel.

Reference Date Functionality

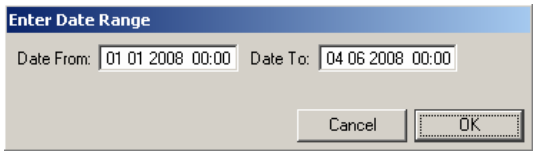
A number of queries use this functionality to allow a 'Date Range' to be entered – then only records between the set dates will be returned.

Within the query window



- Click onto the '1' icon

The 'Reference Date' window will appear:



- Enter the 'Date Range'

Queries that use the 'Reference Date' functionality generally have some note of it in the name of the

Query > ie 'Current Postings Ref Date'.

The 'Reference Date' is set on a per user basis and is stored in the central database – so it will be stored for a user regardless of which machine they use to log in from.